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# Foreign Crops and MARKETS



VOLUME 57

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L A T E      N E W S

An Argentine decree published November 5 authorized the Department of Industry and Commerce to handle issuance of wool export permits, subject to approval by its supply bureau in light of domestic requirements and by the National Economic Council with reference to type of currency offered in payment. The trade advises that only U.S. dollars, Dutch florins and Belgian francs are currently acceptable.

C O R R E C T I O N

The "Late News" item in Foreign Crops and Markets of November 1, 1948 reporting the removal, effective October 12, 1948, of Northern Ireland and Eire from the Bureau of Animal Industry's list of countries having foot-and-mouth and rinderpest disease, should have read:

"The last outbreaks of foot-and-mouth and rinderpest occurred in Eire in 1941 and 1866, respectively. Northern Ireland has not had an outbreak of foot-and-mouth disease since the middle of 1941."

The Canadian Wartime Prices and Trade Board on October 28 announced maximum prices, effective November 1, 1948, for imported tomatoes, lettuce, celery, and spinach.

For lettuce, celery and spinach wholesalers may add to other laid-down cost up to 15 percent on sales to retailers and 8 percent on sales to wholesalers. Non-importing wholesalers buying from importing wholesalers may add up to 8 percent. Retailers buying from wholesalers may add 25 percent and direct importing retailers 30 percent.

For tomatoes, trade mark-ups are as follows: Importing wholesaler to retailer 20 percent; wholesale distributors or buyers 11 percent; non-importing wholesalers to retailers 10 percent, retailers 30 percent and direct importing retailers 35 percent.

To determine the average laid-down cost, wholesalers are required to average the cost of shipments, and to report in advance to the nearest Foods Officer of the Wartime Prices and Trade Board.

## FORECAST WORLD 1948-49 TOBACCO HARVEST SLIGHTLY ABOVE 1947-48

The world's tobacco harvest during the 12 months, July 1948 through June 1949, is now forecast at 7,340 million pounds, as compared with a revised estimate of 1947-48 production of 7,271 million and the prewar average, 1935-39, output of 6,597 million.

Production in 1948-49 in the United States and some other countries is definitely lower than 1947-48 harvests, but the declines in these areas are now expected to be more than offset by increases in China, the Philippines, India, and South Africa. Weather conditions and other factors will affect crops in countries where harvests occur during the first half of 1949 and world production may vary substantially from the above forecast. The world crop now is forecast at approximately 1 percent above the revised 1947-48 output.

The 1948-49 production of flue-cured leaf, the principal type entering world trade, will be somewhat below the large 1947-48 outturn. The sharp reduction of nearly 300 million pounds in the 1948 United States crop, however, has been partly offset by a record crop in China. Record flue-cured crops during the first half of 1949 are also anticipated in southern African countries and some increases from the previous year are expected in some of the Latin American producing countries. Reports from India now indicate a flue-cured acreage for harvest in the early months of 1949 at about equal or somewhat below the area harvested in the early months of 1948.

Information received during recent weeks continue to indicate a 1948-49 world production of Oriental or Turkish type tobacco about equal to or slightly above 1947-48. Reductions from 1947 are still reported for Turkey and Greece, but substantially larger crops are indicated for Bulgaria, the U.S.S.R., and Yugoslavia. The relatively small production in Southern Rhodesia and other minor producing countries will probably about equal 1947-48 harvests.

The 1948-49 world production of light air-cured types of tobacco, which represent an important portion of total production in many producing countries, is still expected to exceed the 1947-48 output. The production of dark types other than strictly cigar leaf are expected to about equal that of 1947-48 and the production of cigar types will probably substantially exceed the 1947-48 output, as a result of larger crops in Cuba, the Netherlands East Indies, and the Philippines.

North America. An official estimate of Canada's 1948 tobacco production places the crop at 109 million pounds, as compared with a revised estimate of the 1947 production of 107 million pounds. The 1948 acreage harvested was somewhat below that of 1947, but the average yield per acre was substantially higher than in 1947. The United States crop was forecast as of October 1, 1948, at 1,820 million pounds, as compared with 2,108 million in 1947, and the average prewar production of 1,460

(Continued on Page 393; table follows)

Continent and Country	Acreage Harvested			Yield per Acre 2/			Production		
	Average 1935-39	1947 3/	1948 3/	Average 1935-39	1947 3/	1948 3/	Average 1935-39	1947 3/	1948 3/
	1,000 acres	1,000 acres	1,000 acres	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds
<u>NORTH AMERICA:</u>									
Canada	69	125	110	1,103	852	987	76,556	106,688	109,055
Mexico	51	-	840	-	-	-	42,426	55,115	-
United States	1,647	1,845	1,536	887	1,142	1,185	1,460,054	2,107,763	1,820,032
Cuba	107	112	-	474	540	-	50,833	60,853	-
Dominican Republic	-	38	-	-	1,200	-	13,660	45,685	-
Puerto Rico	44	23	-	673	875	-	29,393	24,500	-
Estimated total 5/	1,960	2,260	1,940	-	-	-	1,710,000	2,421,000	2,150,000
<u>EUROPE:</u>									
Albania	5	-	826	-	-	-	4,082	-	-
Belgium	6	7	2,500	2,079	2,200	16,431	-	-	-
Bulgaria 6/	94	200	809	921	750	75,871	13,391	15,400	150,000
Czechoslovakia 6/	24	17	1,288	1,087	1,180	7/ 31,143	105,821	106,923	20,062
France 6/	44	72	1,676	1,598	1,603	72,925	115,062	-	-
Germany	33	-	2,254	-	-	74,355	-	-	-
Greece 6/	226	200	172	589	516	132,819	103,322	87,200	48,016
Hungary 6/	37	47	1,258	792	1,021	45,872	27,528	143,000	143,000
Italy 6/	81	143	1,173	999	1,038	95,511	143,299	44,864	44,864
Poland	17	30	1,664	892	1,430	28,566	26,455	42,000	42,000
Romania 6/	44	59	70	647	598	600	28,697	35,274	33,069
Spain	-	30	37	-	1,027	884	17,322	30,452	31,500
Sweden	1	1	1	1,735	1,342	1,500	1,061	908	5,550
Switzerland	1	3	3	1,571	1,856	1,850	2,276	5,512	-
Yugoslavia	39	-	-	969	-	-	37,410	-	-
Estimated total 5/	630	800	870	-	-	-	675,000	720,000	790,000
<u>U.S.S.R.</u>									
	7/	490	-	-	7/ 1,129	-	-	525,000	-
<u>ASIA:</u>									
Iran	32	38	-	1,096	1,027	-	34,542	38,581	-
Iraq	7/ 11	-	-	7/ 752	-	-	7/ 8,057	-	-
Palestine	7	-	-	401	-	-	2,760	2,240	-
Syria and Lebanon	7/ 13	20	-	7/ 699	667	-	7/ 8,825	13,285	-
Turkey	194	320	270	661	688	670	128,505	220,460	180,900
Burma	108	-	-	990	-	-	107,072	-	-
China 8/	1,228	1,476	1,529	1,021	983	1,062	1,254,539	1,452,293	1,623,482
French Indochina	7/ 44	-	-	728	-	7/ 32,004	-	-	-

India 2/	7/ 1,272	-	-	7/ 854	-	-	-	7/ 1,085,653	-	-
Japan	92	102	4	1,621	1,458	1,252	1,700	1,444	1,444	1,444
Formosa	4	9	37	1,458	1,252	1,077	1,077	57,304	5,961	148,680
Korea	16	-	-	1,252	-	-	-	-	5,961	6,800
Java and Madura: Estate	69	-	-	7/ 976	402	-	-	7/ 67,672	-	-
Native	31	3	-	7/ 983	427	-	-	7/ 140,298	-	-
Sumatra & Java	176	83	-	7/ 458	688	-	-	7/ 30,715	2,646	-
Philippine Islands	25	-	-	7/ 889	458	-	-	7/ 74,811	38,098	-
Siam	3,750	3,660	3,715	7/ -	-	-	-	7/ 17,179	-	-
Estimated total 5/	3,750	3,660	3,715	-	-	-	-	3,250,000	3,150,000	3,380,000
<hr/>										
<b>SOUTH AMERICA:</b>										
Argentina	34	57	-	928	850	-	-	31,558	18,450	-
Brazil	237	320	8	851	794	-	-	202,703	254,000	-
Chile	9	15	-	1,846	1,634	-	-	16,618	12,546	-
Colombia	37	22	24	7/ 803	882	-	-	7/ 29,706	39,683	-
Paraguay	2	-	-	801	1,000	-	-	17,792	24,251	-
Uruguay	355	475	455	825	-	-	-	1,254	-	-
Estimated total 5/	355	475	455	-	-	-	-	305,229	400,000	408,000
<hr/>										
<b>AFRICA:</b>										
Algeria	56	53	55	691	597	675	675	38,667	31,526	37,125
Nyasaland	57	-	-	286	-	-	-	16,311	22,850	-
Madagascar	19	-	-	7/ 764	-	-	-	7/ 14,164	-	-
Northern Rhodesia	7/ 4	14	-	7/ 426	369	-	-	7/ 1,635	5,150	-
Southern Rhodesia	51	124	-	507	640	-	-	26,061	79,130	-
Tunisia	1	-	-	1,196	-	-	-	1,202	-	-
Union of South Africa	7/ 11	-	-	7/ 500	-	-	-	7/ 20,476	50,521	-
Estimated total 5/	215	395	420	-	-	-	-	125,000	203,000	220,000
<hr/>										
<b>OCEANIA:</b>										
Australia	10	4	-	532	528	-	-	5,276	2,192	-
New Zealand	2	4	-	787	1,184	-	-	1,457	5,110	-
Estimated total 5/	12	9	11	-	-	-	-	6,733	7,302	9,000
Estimated world total 5/	7,492	8,101	7,921	-	-	-	-	6,597,000	7,271,000	7,340,000

1/ Year beginning July 1. For North temperate zones countries, harvests July through October of the year shown; for all other countries, harvests November-December of the year shown and January through June of the following year. In similar tables prepared in recent years data for Northern Hemisphere countries below the Temperate Zone have been harvests of the year shown rather than harvests following the July-October harvest in North temperate zone countries. 2/ Some yields are calculated from detailed acreage and production estimates rather than estimates rounded to the nearest thousand. 3/ Preliminary. 4/ Exports, production data not available. 5/ Totals include approximations for countries not listed and for countries listed where data are not available. 6/ Data for 1935-39 not comparable with subsequent years. Data for 1947 and 1948 are for postwar areas. 7/ Less than a 5 year average. 8/ Free China for 1935-39. All China except Manchuria for 1947 and 1948. 9/ India and Pakistan.

## FOREIGN DRIED PRUNE OUTPUT DECLINES 1/

The 1948 preliminary estimate for dried-prune production in the 8 leading foreign producing countries is 31,800 short tons, compared with 36,100 tons (revised) in 1947 and 31,300 tons in 1946. The estimate is 2 percent above the 5-year (1942-46) average of 31,100 tons and 16 percent below the 10-year (1937-46) average of 37,700 tons. The upward revision in the 1947 estimate was necessitated by a much heavier pack in France and Argentina than earlier reports indicated. Declines in production are reported for Argentina, France, and the Balkans this season while increases are reported for Australia and Chile.

Growing conditions in Argentina, Australia, and Chile were generally satisfactory. France and the Balkan countries experienced a cool, wet summer which was detrimental to the crop. The Union of South Africa reported some drought which prevented the fruit from sizing. The quality of foreign prunes in general this season is inferior to that of a year ago though some countries report about average quality.

Marketing of foreign prunes in the 1947-48 season was not overly satisfactory, and a few countries report carry-overs. Exports were restricted by the high domestic prices of prunes in these countries and the shortages of foreign exchange on the part of importing countries. As a result, international trade in this commodity was much below prewar.

The 1948-49 marketing season opened with burdensome surpluses in some of the Southern Hemisphere countries and a very poor demand. While the foreign exchange situation in the principal importing countries is still bad, a few faint rays of hope for improvement are visible. The European Recovery Plan is looked upon by many of the European importers as a possible hope for imports, though the various foreign governments are still a little reluctant to use funds for dried fruit when they feel that there is more urgent need for other items. It appears that the foreign trade in prunes this season will be slow, and tonnages much below those of a normal prewar year.

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This is one of a series of regularly scheduled reports on world agricultural production approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, Gustave Burmeister and Walter R. Schreiber.

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1/ A more extensive statement may be obtained from the Office of Foreign Agricultural Relations.

PRUNES, DRIED: Estimated commercial production  
in specified countries, averages 1942-46 and 1937-46,  
annual 1943-48.  
(Rounded to nearest 100 short tons)

Year	Argentina	Australia	Chile	France	South Africa
	Short tons				
<u>Averages</u>					
1942-46	3,600	3,000	1,800	2,500	1,500
1937-46	2,800	3,000	1,500	2,600	1,100
Annual					
1943	4,200	3,100	1,300	2,700	900
1944	2,900	3,600	1,900	3,800	1,600
1945	4,300	1,900	1,800	1,100	1,300
1946	4,800	3,000	2,600	4,100	1,600
1947 b/	c/ 5,900	2,200	2,900	c/ 11,000	1,900
1948 b/	4,100	3,400	3,200	8,200	1,900

Year	Balkan countries a/	Foreign total	United States	World total
	Short tons	Short tons	Short tons	Short tons
<u>Averages</u>				
1942-46	18,700	31,100	200,500	231,600
1937-46	26,700	37,700	207,200	244,900
Annual				
1943	31,600	43,800	207,700	251,500
1944	4,200	18,000	163,200	181,200
1945	21,700	32,100	233,800	265,900
1946	15,200	31,300	221,200	252,500
1947 b/	c/ 12,200	c/ 36,100	c/ 201,200	c/ 237,300
1948 b/	11,000	31,800	178,400	210,200

a/ Includes Bulgaria, Rumania, and Yugoslavia.

b/ Preliminary. c/ Revised.

## UNITED STATES: Exports of dried prunes, 1947-48 with comparisons

Crop year, September/August

Country	Averages								Annual							
	1943-47		1938-47		1942-43		1943-44		1944-45		1945-46		1946-47		1947-48	
	Short tons															
Austria .....	560	280	0	0	0	0	0	0	0	0	0	6	2,792			
Belgium .....	2,624	2,345	0	0	897	1,398	6,978	3,845								
Czechoslovakia ....	418	378	0	0	784	1,102	205	0								
Denmark .....	11	1,073	0	0	0	0	0	0	0	0	0	1	55			
Finland .....	1	400	0	0	0	0	0	0	0	0	0	0	3			
France .....	83	2,101	0	0	194	1	3	217								
Germany .....	15,282	8,176	0	0	0	0	1	76,408								
Ireland .....	427	337	0	0	0	0	916	1,208	13							
Italy .....	672	456	0	29	856	871	74	1,529								
Netherlands .....	379	1,522	0	0	857	627	120	290								
Norway .....	356	730	0	0	50	1,730	0	1								
Poland and Danzig	649	484	0	0	3,245	a/	a/	0								
Sweden .....	2,475	2,518	a/	1,121	386	5,046	5,824	0								
Switzerland .....	859	768	0	544	824	1,908	444	576								
United Kingdom ....	24,872	27,957	36,365	36,047	17,901	36,587	33,823	4								
Other Europe .....	198	277	641	524	325	12	125	3								
Total Europe .....	49,866	49,802	37,006	38,265	26,319	50,199	48,812	85,736								
Canada .....	11,479	10,604	11,206	13,675	13,080	14,330	11,930	4,381								
Others .....	11,302	9,321	5,421	5,466	5,550	11,193	10,128	24,169								
Total	72,647	69,727	53,633	57,406	44,949	75,722	70,870	114,286								

Compiled from official sources of the Bureau of Census.

a/ Less than 1/2 ton.

## WORLD PLUM AND PRUNE CROP SMALLER

World production of plums and prunes for all purposes (fresh basis) for 1948 is indicated to be 2.3 million short tons, 4 percent below the 2.4 produced during the previous season, but 18 percent below the prewar (1935-39) average of 2.8 million.

The North American total of 624,875 tons is 11 percent below the 1947 crop of 698,575 and 23 percent below the prewar average of 808,731 tons. The United States continues to be the world's largest producer of plums and prunes with a production in 1948 of 604,500 tons, compared with 675,000 tons during 1947 and 799,380 tons prewar. Canada's 1948 crop is now estimated at 14,875 tons, 18 percent below last year's crop of 18,075. The Mexican plum crop of 5,500 tons has remained constant for the past few years, but is twice the size of the prewar average of 2,751 tons. Production in Europe is indicated to be 1,497,800 tons, 2,000 tons less than the previous season, but 19 percent below the prewar average of 1,857,400. Production in Belgium is estimated at 27,600 tons, about the same as the 1947 crop, but twice the prewar production.

In France the plum crop was fair and is estimated at 94,798 tons, 26 percent below 1947 but a little more than twice the 1935-39 average of 45,612 tons.

The Italian crop of 62,831 tons is practically the same as the 1946 crop but almost 10,000 tons less than the crop of the previous year. The plum crop in Norway estimated at 11,505 tons is about average. In the United Kingdom, the plum crop, estimated at 163,520 tons, is only 3,000 tons less than the large harvest of 166,680 tons in 1947. Asia's plum crop indicated at 104,200 tons, is 22 percent above last year's output of 85,285 tons but 5 percent below the prewar average of 110,201 tons. Japan and Turkey are the main Asiatic producing countries.

Production in both Argentina and Chile is about the same as for the previous year. The Union of South Africa, Australia and New Zealand will probably have smaller crops than during the previous year.

(Table on following pages)

PLUMS AND PRUNES: Production <sup>1/</sup> in specified countries,  
average 1935-39, annual 1941-48

Continent and country	Average: 1935-39	1941	1942	1943	1944	1945	1946	1947	1948 2/
<u>NORTH AMERICA:</u>									
Canada...	6,600:	13,400:	9,425:	9,075:	13,375:	12,150:	20,275:	18,075:	14,875
Mexico 3/...	2,751:	3,022:	3,235:	3,527:	4,960:	5,162:	5,500:	5,500:	5,500
United States...	799,380:	659,600:	615,400:	703,300:	603,500:	783,900:	791,100:	675,000:	604,500
Plums...	66,960:	76,900:	76,200:	78,500:	96,500:	72,600:	106,000:	76,000:	69,500
Prunes 4/...	732,420:	582,700:	542,200:	624,800:	507,000:	711,300:	685,100:	591,900:	535,000
Total...	808,731:	676,022:	631,060:	715,902:	621,835:	801,212:	816,875:	698,575:	624,875
<u>EUROPE:</u>									
Austria...	61,977:	36,045:	29,431:	35,384:	40,000:	30,000:	51,438:	35,000:	50,000
Belgium...	13,982:	8,091:	13,714:	11,150:	11,263:	20,857:	19,676:	27,500:	27,600
Bulgaria...	79,646:	135,727:	178,622:	196,099:	186,289:	184,745:	115,000:	130,000:	120,000
Czechoslovakia...	185,393:	63,631:	67,038:	52,011:	64,196:	36,419:	198,466:	169,298:	176,061
France...	45,612:	26,220:	44,276:	36,082:	35,238:	66,673:	113,628:	128,969:	94,798
Germany...	415,208:	226,853:	246,474:	281,086:	317,627:	238,220:	407,356:	129,822:	194,981
Greece...	5,895:	6,555:	7,201:	6,924:	8,051:	8,300:	6,587:	7,659:	6,587
Hungary...	36,281:	21,555:	17,668:	21,287:	21,190:	16,158:	30,093:	21,715:	18,000
Italy...	56,728:	62,941:	69,114:	66,138:	77,161:	79,220:	62,811:	72,752:	62,831
Luxembourg...	3,7381:	4,945:	8,354:	6,767:	6,794:	12,501:	21,227:	17,928:	17,928
Netherlands...	13,756:	16,688:	28,248:	22,910:	23,000:	25,000:	16,535:	22,707:	38,580
Norway...	9,785:	8,577:	7,858:	5,186:	6,734:	7,302:	12,840:	10,220:	11,505
Poland...	96,161:	52,153:	56,847:	64,806:	70,231:	54,923:	93,915:	30,054:	45,081
Rumania...	87,743:	284,648:	233,318:	281,106:	319,439:	252,736:	253,529:	122,467:	115,742
Spain...	39,691:	43,372:	47,881:	44,448:	46,387:	49,839:	39,373:	45,673:	39,279
Sweden...	2,127:	2,754:	204:	790:	8,956:	9,900:	9,900:	9,900:	11,000
Switzerland...	11,089:	15,432:	18,739:	19,400:	33,069:	11,023:	30,864:	29,762:	33,069
United Kingdom...	95,166:	59,808:	187,712:	144,144:	111,328:	85,792:	136,528:	166,680:	163,520
Yugoslavia...	597,467:	355,854:	391,048:	376,008:	437,249:	450,741:	275,575:	715,368:	271,216
Total...	1,857,388:	1,431,847:	1,653,783:	1,669,726:	1,835,172:	1,742,379:	1,895,369:	1,499,711:	1,497,718

1/ Production is from bloom of year shown and includes plums and prunes produced for fresh consumption, drying and processing. 2/ Preliminary. 3/ Does not include wild plums which are 85 percent of total production. 4/ Includes

✓ Included with Syria. ✓ Includes Lebanon. ✓ One year.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States Foreign Service officers, results of office research and other information. Estimates of countries having boundary changes have been adjusted to prewar boundaries.

## WORLD APRICOT PRODUCTION UP 4 PERCENT

The 1948 estimated world production of apricots for all purposes (fresh basis) is indicated to be 473,500 short tons, 4 percent above the 1947 crop of 453,700 but 12 percent lower than the prewar (1935-39) average of 536,600 tons.

The North American total, consisting of Canada, Mexico and the United States, is estimated at 258,475 tons, 26 percent higher than the previous year's crop of 205,900 but 4 percent less than the prewar average of 269,286 tons.

Canada's crop of 3,475 tons, grown only in British Columbia is 20 percent above the previous year's crop of 2,900 tons and almost 3 times as large as the prewar average of 1,255. Production in the United States confined to California, Washington and Utah is estimated at 249,500 tons, an increase of 26 percent over the 1947 crop of 197,500 but 6 percent below the 1935-39 average of 265,170 tons.

European production, estimated at 131,955 tons, is 24 percent below the 1947 crop of 172,896 and 27 percent below the 1935-39 average of 181,765. In Austria, late frosts and cold rains destroyed almost the entire apricot crop, which is now indicated to be only 496 tons compared with 7,706 in 1947 and 3,973 tons prewar. The crop in Czechoslovakia, estimated at 6,845 tons, compared with 12,544 last season, is the result of late frosts which damaged early blossoms. Production in France is low because of severe frost which only late varieties escaped. The indicated production in 1948, compares with 48,501 for the previous year and 17,867 prewar.

In Asia, indications are for a larger crop in 1948 and in South America the output probably will be about the same as in 1947.

In Oceania, the crop may be somewhat smaller than for 1947 but about the same as prewar.

APRICOTS: Production<sup>1/</sup> in specified countries,  
average 1935-39, annual 1941-45

Continent and country	Average 1935-39	1941	1942	1943	1944	1945	1946	1947	1948 2/
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
<b>NORTH AMERICA:</b>									
Canada...	1,225	1,900	2,450	625	3,650	2,175	3,675	2,900	3,475
Mexico...	2,861	4,743	4,779	4,297	4,689	5,409	5,512	5,500	5,500
United States...	265,110	211,900	225,100	104,400	751,300	131,500	176,700	191,500	219,500
Total...	269,286	220,543	215,123	109,322	160,339	198,131	17,357	205,200	238,475
<b>EUROPE:</b>									
Aegean Islands...	265	230	215	255	311	300	283	196	255
Austria...	3,975	1,078	1,495	3,430	1,578	4,971	9,755	7,706	496
Czechoslovakia...	7,159	2,265	3,140	7,167	3,308	10,416	15,792	12,544	6,845
France...	17,867	34,306	25,302	22,212	26,117	41,555	24,020	48,501	13,223
Germany...	1,046	951	132	302	139	438	666	1,551	1,314
Hungary...	26,550	6,062	8,420	19,137	8,819	27,555	24,692	19,620	10,791
Italy...	27,994	17,943	24,631	19,841	24,251	24,284	22,046	15,432	19,841
Luxembourg...	12	70	52	46	54	86	50	101	27
Romania 3/	20,856	13,399	16,610	15,130	18,451	16,500	16,555	5,429	1,100
Spain...	59,121	63,644	82,432	67,516	85,466	85,500	77,774	51,442	79,230
Switzerland...	1,610	4,740	1,433	4,850	5,291	4,529	7,937	7,223	5,056
Yugoslavia...	15,112	9,199	13,610	11,054	11,431	14,000	11,221	2,141	2,712
Total...	161,165	153,613	179,572	170,971	187,631	210,101	210,771	172,896	171,255
<b>ASIA:</b>									
Lebanon...	4	4	352	3,086	4,200	3,397	4,260	5,000	5,000
Palestine...	6,572	6,189	5,512	4,409	7,010	4,597	7,046	7,000	7,000
Syria...	26,440	5/ 12,676	14,605	29,652	25,794	23,922	23,519	15,739	20,000
Turkey 6/	16,948	4,501	34,746	15,521	12,421	15,124	11,124	5,566	15,000
Total...	51,300	21,669	55,215	52,670	50,671	47,020	43,564	41,395	41,000
<b>SOUTH AMERICA:</b>									
Argentina...	7,000	7,937	14,337	8,102	11,211	8,706	8,653	8,507	8,500
Uruguay...	620	180	400	560	620	525	740	500	500
Total...	7,620	8,317	14,737	8,682	12,041	9,151	9,391	9,607	9,600
<b>OCEANIA:</b>									
Australia...	25,038	30,037	24,944	32,233	19,821	24,305	21,875	27,000	25,000
New Zealand...	1,271	1,554	2,539	1,987	561	2,044	1,464	2,037	1,520
Total...	26,889	31,691	26,533	34,218	20,373	26,351	29,319	29,071	26,520
World total...	536,610	435,051	511,389	375,863	630,683	712,407	646,046	453,741	473,530

1/ Production is from bloom of year shown and includes apricots produced for fresh consumption, drying and processing.  
2/ Preliminary. 3/ Includes peaches. 4/ Included with Syria. 5/ Includes Lebanon. 6/ Does not include wild apricots.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States Foreign Service officers, results of office research and other information. Estimates of countries having boundary changes have been adjusted to prewar boundaries.

## WORLD COFFEE PRODUCTION FORECAST SLIGHTLY LARGER

World coffee production for 1948-49, according to early-season forecasts, will be slightly larger than during 1947-48, but still below the 1935-39 average. Exportable production from 1948-49 crops is placed at 32,000,000 bags (132 pounds each) compared with 31,000,000 bags for 1947-48 and the 1935-39 average of about 36,000,000 bags. The American coffee-producing countries account for nearly all the increase. Slightly larger production also is forecast for Asia and Oceania, but Africa's production is expected to be less than for 1947-48.

America. Exportable production from the 1948-49 crop in Brazil (harvested March to October 1948), estimated at 17.9 million bags, compares with 16.7 million bags the previous season. The increase occurred in the principal producing State of Sao Paulo where a large crop of 11,000,000 bags was produced, compared with 8.3 million in 1947-48. The estimated 1948-49 outturn in other Brazilian States is less, totaling only 6.9 million bags compared with 8.4 million the previous year. Although the coffee berry borer or Broca Stephanoderes hampei (Ferr.) has spread to new areas in Brazil, it appears that it has affected the quality of the coffee much more than the quantity. According to reports, Broca-damaged coffee is not being withheld from the market but is being mixed with clean coffee. The Broca is most prevalent in central Sao Paulo, Minas Gerais, Espirito Santo and Parana. The coffee produced this year in Broca-free areas is said to be of better quality than last year's crop.

The borer does no permanent damage to the coffee trees, attacking only the berry. The consensus is that the pest can be controlled by removing all coffee berries from the trees and off the ground after the harvest, and by insecticidal control measures.

Only incomplete production data have been available for Colombia for several seasons; however, a study of exports, consumption, and stocks indicates that exportable production for 1947-48 approximated 5.8 million bags. On the basis of favorable weather in most producing zones and new trees coming into bearing, exportable production from the 1948-49 crop is forecast at 6 million bags.

Since April 1947 the Colombian Coffee Federation has purchased Colombian coffee to maintain minimum export prices. At various times the Federation has held substantial stocks. Federation-held stocks at the present time, however, are not believed excessive.

El Salvador's 1948-49 production is expected to exceed the 1947-48 outturn of 1 million bags for export. Very little old-crop coffee has been carried over, and substantial quantities of new-crop coffee already have been sold. Incomplete information from Guatemala indicates a crop slightly larger than for 1947-48, which was unofficially estimated at 850,000 bags for export.

(Text continued on Page 394)

COFFEE: Estimated total and exportable production in specified countries,  
average 1935/36-1939/40, annual 1946/47-1948/49

Continent and country	Average		1946/47		1947/48 b/		Forecast	
	1935/36 - 1939/40		1946/47		1947/48 b/		1948/49 b/	
	Total	Exportable	Total	Exportable	Total	Exportable	Total	Exportable
<u>America</u>								
Costa Rica	390	330	362	313	460	410	365	315
El Salvador	1,091	1,011	1,093	978	1,150	1,035	1,195	1,080
Guatemala	1,002	922	1,130	900	1,080	850	(1,130)	(900)
Honduras	57	27	90	50	95	55	85	45
Mexico	959	609	925	525	1,000	565	1,000	565
Nicaragua	280	253	220	170	290	240	190	140
Cuba	425	58	589	0	551	0	479	e/
Dominican Republic	347	222	343	193	340	190	330	180
Haiti	538	438	595	400	570	375	570	375
Brazil	26,938	22,638	19,934	14,563	22,062	16,687	23,300	17,925
Colombia	4,452	4,202	(6,500)	(6,040)	(6,300)	(5,840)	(6,500)	(6,040)
Ecuador	d/ 268	223	170	120	235	185	265	215
Peru	80	47	84	15	77	5	80	e/
Venezuela	940	740	800	550	850	600	(850)	(600)
Others e/	306	180	285	32	244	40	(250)	(42)
Total	38,073	31,900	33,120	24,849	35,304	27,077	36,589	28,422
<u>Africa</u>								
Belgian Congo	320	300	520	495	550	525	(550)	(525)
British East Africa	785	775	785	775	813	803	700	690
Ethiopia	345	263	335	250	420	335	(420)	(335)
French West Africa	250	207	934	884	660	610	(700)	(650)
Madagascar	537	437	500	392	285	177	317	209
Angola	300	273	883	783	776	676	621	521
Others f/	65	60	273	257	280	260	(280)	(260)
Total	2,602	2,315	4,230	3,836	3,784	3,386	3,588	3,190
<u>Asia</u>								
Yemen	130	76	150	100	150	100	(150)	(100)
India	278	155	257	20	249	12	288	50
Netherland Indies	1,961	1,356	335 g/	205	335	205	(500)	(370)
Others h/	75	60	75	35	85	40	(95)	(45)
Total	2,144	1,647	817	360	819	357	1,033	565
<u>Oceania i/</u>								
	101	53	80	30	80	30	85	30
World total	43,220	35,915	38,247	29,075	39,987	30,850	41,295	32,207

a/ Production is given by crop years in the various countries. Generally the main coffee harvesting period begins about October and continues until February or March of the following year, except in certain Southern Hemisphere countries such as Brazil, Madagascar, and the Netherlands Indies where the main harvest begins April to June and is completed about October of the same year.

b/ Preliminary.

c/ Exports prohibited.

d/ Average for years 1936/37 to 1939/40.

e/ Includes Guadeloupe, Puerto Rico, Surinam, British West Indies and Panama Republic.

f/ Includes French Cameroons, French Equatorial Africa, San Tome and Principe, British West Africa, and Spanish Africa.

g/ Only 26,000 bags of coffee were legally exported from the Netherlands Indies in 1946, but exports are known to have been much larger as a result of unrecorded exports from Republican-held territory.

h/ Includes Indo-China, Philippines and Timor.

i/ Includes Hawaii, New Caledonia, and New Hebrides.

Office of Foreign Agricultural Relations. Compiled or estimated from International Yearbook of Agricultural Statistics, official reports, and reports of United States Foreign Service officers. Figures in parentheses are Office estimates.

## WORLD COTTON STOCKS ONLY TWO-THIRDS OF PREWAR LEVEL

World cotton stocks on hand July 31, 1948, are estimated at 14 million bales (of 500 pounds gross, except running bales in the U.S.) compared with 17.5 million a year ago, 24.65 million 2 years ago, and 23.75 million in 1939. The all-time peak of 28.5 million bales was reached at the end of the war in 1945. The United States, Egypt, and Brazil are the only major-producing countries that had any significant stocks of old-crop cotton on hand at the beginning of the current crop year. Stocks in other producing countries at the beginning of the new season were generally adequate for the domestic mill industries for 3 to 6 months, with very little cotton available for export until the new crops began to arrive on the market in August and September, December, and later in the Southern Hemisphere.

Stocks in the surplus-producing countries as a whole were about 20 percent below those of a year ago. The substantial decrease in most foreign countries, more than offsets the 22 percent increase in United States stocks.

In the countries that produce insufficient quantities for home use (China, Korea, southern Europe and parts of South America) or none at all (mostly in Europe) stocks were also down by about 20 percent. Despite this decline, however, stocks were still generally sufficient for 3 to 8 months' requirements. These stocks in most cases barely exceed minimum working stock requirements and probably will be maintained at or above this level in 1948-49 through importations roughly equivalent to the quantities to be consumed in 1948-49.

The crop year, 1947-48, appears to mark the end of a 10-year period of excessive world cotton surpluses that began with the record 1937-38 world crop of 39 million bales. Stocks accumulated rapidly in most of the producing countries, especially in the United States, Egypt, and Brazil during the next 8 years while world production remained above world consumption, and export trade was restricted (1939 to 1945) by war and blockade. During the first 3 postwar years, world consumption exceeded production by 2.5 to 3.5 million bales annually, resulting in rapid liquidation of surplus stocks.

The 1948-49 world production, estimated at 29,750,000 bales, is more than one million bales larger than estimated requirements for world consumption this year and stocks may be expected to rise by this amount. Stocks in the United States are expected to increase by 2 to 3 million bales by the end of this crop year as a result of the unusually large crop of 15,166,000 bales, while stocks in foreign producing countries may be further decreased by 1 to 2 million bales as no large increases in production were reported this year.

Stocks in the United States rose by 22 percent from 2,530,000 bales on August 1, 1947 to 3,082,000 in 1948. Those in Mexico continued on a downward trend from 279,000 bales on August 1, 1947 to 100,000 in 1948.

(Continued on Page 392)

Cotton: Estimated world stocks by principal countries,  
 July 31, 1948, with comparisons a/  
 (In bales of 500 pounds gross)

Country	Stocks on hand July 31			
	1939	1946	1947	1948
	1,000 bales	1,000 bales	1,000 bales	1,000 bales
<u>Surplus countries:</u>				
Mexico.....	150	321	279	100
United States b/.....	13,033	7,326	2,530	3,082
Haiti.....	5	2	8	3
Iran.....	40	60	24	17
India c/.....	2,165	3,540	3,000	1,760
Pakistan.....	-	-	250	78
Turkey.....	70	61	50	70
Argentina.....	243	474	405	439
Brazil.....	661	3,038	1,900	1,200
Paraguay.....	11	14	12	4
Peru.....	200	285	163	126
Anglo-Egyptian Sudan.....	107	79	65	60
Belgian Congo.....	150	195	137	87
British East Africa.....	75	130	150	113
Egypt.....	325	1,787	1,354	878
French Equatorial Africa...:	15	65	30	24
Others d/.....	1,050	763	643	734
Total surplus countries.:	18,400	18,140	11,000	8,775
<u>Deficit countries:</u>				
Canada.....	56	88	110	82
Cuba.....	10	11	21	9
Belgium.....	150	140	150	147
Czechoslovakia.....	100	34	105	58
France.....	700	920	586	292
Italy.....	250	278	556	340
Netherlands.....	80	92	120	110
Spain.....	50	68	86	122
Sweden.....	60	110	78	79
Switzerland.....	100	103	99	91
United Kingdom.....	1,045	1,990	2,023	1,357
China, incl. Manchuria c/ :	900	1,285	1,230	1,165
Japan.....	556	159	181	236
Korea.....	43	55	40	50
Colombia.....	5	42	60	72
Australia.....	20	61	75	94
Others e/.....	775	374	480	521
Total deficit countries.:	4,800	5,810	6,000	4,825
Afloat f/.....	550	700	500	400
World total.....	23,750	24,650	17,500	14,000

a/ Estimates for Southern Hemisphere countries include unginned cotton on hand at the end of July. b/ Running bales. c/ Includes estimates for non-commercial stocks. d/ Mostly U.S.S.R. and Mozambique. e/ Mostly countries in Europe and South America not listed above. f/ Approximately half of world exports in July.

## COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS AND FEEDSRIO GRANDE SO DUL, BRAZIL,  
EXPORTS MORE RICE

Third-quarter rice exports from Rio Grande do Sul, principal rice-exporting State of Brazil, equaled 106,000,000 pounds, bringing the January-September 1948 total to 327,000,000 compared with 181,000,000 pounds in the same period of 1947. Principal countries of destination, in terms of milled, were as follows (million pounds): India, 133; Malayan Union, 56; Netherlands Indies, 43; British Empire, 21; British West Indies, 17, Reunion Islands, 14; Union of South Africa, 11; Madagascar, 11; Netherlands, 8; and Belgium, 5.

Export supplies in Rio Grande do Sul now appear to be nearly exhausted. Reduced acreages in 1947-48 resulted in decreased supplies in all Brazil, and shipments to other States, therefore, have increased sharply during 1948. January-September shipments to other Brazil amounted to 303,000,000 pounds against 176,000,000 during the same months of the year before. Deliveries to the Federal District and Rio de Janeiro, normally quite heavy, were up 78 percent, and there was need for rice in the State of Sao Paulo for the first time in several years. Sao Paulo in 1947 had substantial rice exports.

RIO GRANDE DO SUL: Rice shipments to other Brazilian States,  
January-September 1948, with comparisons

State	: Average :			: January-September a/		
	: 1945		: 1946		: 1947 a/	
	: 1936-40		:		: 1947 : 1948	
	: Million	: Million	: Million	: Million	: Million	: Million
	: pounds	: pounds	: pounds	: pounds	: pounds	: pounds
Federal District	136	145	142	113	(120	(213
Rio de Janeiro	9	13	21	53	(	)
Sal Paulo	84	2	0	0	0	31
Parana	12	8	1	0	0	b/ c/
Bahia	7	13	21	16	14	14
Pernambuco	9	17	21	17	13	17
Others	13	18	30	36	29	28
Total shipments	270	216	236	235	176	b/ 303
Foreign exports	71	160	309	214	181	327

a/ Preliminary. b/ Does not include approximately 37,000,000 pounds shipped to Sao Paulo and Parana by rail. c/ Not separately reported.

Rio Grande do Sul Rice Institute.

ECUADORAN RICE  
EXPORTS UP

Rice exports from Ecuador during the January-August period of 1948 equaled approximately 64 million pounds, compared with 54 million in the corresponding months of the preceding year.

September exports are estimated at about 13 million pounds, bringing the January-September total to more than 75 million pounds. About 36 percent of January-August deliveries went to Cuba, and 30 percent to the Philippines, the next most important destination.

ECUADOR: Rice exports by country, January-August 1948,  
with comparisons

Country of destination	Average		1945		1946		1947 a/		January-August a/		
	1937-1941		1945		1946		1947 a/		1947		
	Million pounds		Million pounds		Million pounds		Million pounds		Million pounds		
Cuba.....	2	:	55	:	46	:	12	:	0	:	23
Peru.....	13	:	0	:	0	:	0	:	0	:	5
Venezuela.....	6	:	4	:	17	:	49	:	27	:	1
Colombia.....	4	:	b/	:	2	:	13	:	8	:	2
Panama.....	2	:	b/	:	5	:	4	:	3	:	6
Jamaica.....	0	:	0	:	16	:	7	:	7	:	0
Philippines.....	0	:	0	:	20	:	0	:	0	:	19
India.....	0	:	0	:	0	:	38	:	0	:	0
Others.....	4	:	6	:	c/	24	14	:	9	:	8
Total....	31	:	65	:	139	:	137	:	54	:	64

a/ Preliminary. b/ Less than 500,000 pounds. c/ Includes 6 million pounds to Mexico, and 5 million to Greece.

Compiled from official sources.

Exports in 1948 have been primarily of carry-over stocks from the record 1947 crop, of which some supplies still remain available for export. Reduced plantings in 1948, caused by declining prices, have resulted in a substantial drop in Ecuador's rice output.

The current estimate of the 1948 crop is 6,200,000 bushels (180,000,000 pounds milled) compared with 8,945,000 bushels (260,000,000 pounds), and with the prewar average of 3,417,000 bushels (100,000,000 pounds).

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FATS AND OILS**MALAYAN COPRA, COCONUT  
OIL EXPORTS INCREASE**

Malayan copra and coconut oil exports (in terms of copra) amounted to approximately 81,000 long tons during January-August 1948. While this figure shows a considerable improvement over the 45,046 tons shipped in the same months of last year, it is only one-fourth of the prewar average of 8 months. August copra exports totaled 7,900 tons and coconut oil 3,979. European countries were the principal markets for both commodities.

**MALAYA: Copra and coconut oil exports and imports,  
August 1948 with comparisons  
(Long tons)**

Country	Copra distribution				August 1948 a/
	Average:		1947	January-July 1947 a/	
	1935-39:	1947	1948 a/	1948 a/	
<u>Exports</u>	:	:	:	:	:
United Kingdom .....	57,750	6,119	3,719	1,065	106
Other European Countries ...	118,490	-	-	21,956	6,796
Other British Possessions ...	3,242	-	-	-	-
Hong Kong .....	-	999	-	24	-
Other countries .....	12,209	-	-	843	998
Total .....	191,691	7,118	3,719	23,888	7,900
<u>Imports</u>	:	:	:	:	:
British Possessions ....	10,617	582	323	1,628	641
Netherlands Indies .....	105,500	51,877	29,258	50,586	6,181
Other countries .....	2,134	147	142	347	198
Total .....	118,251	52,606	29,723	52,561	7,020
	:	:	:	:	:
Coconut-oil distribution					
Country	Average:		1947	January-July 1947 a/	August 1948 a/
	1935	39:	1947a/	1948a/	1948 a/
	:	:	:	:	:
<u>Exports</u>	:	:	:	:	:
United Kingdom .....	8,857	27,239	13,959	3,333	-
Other European Countries ...	2,522	643	500	11,737	2,095
Other British Possessions ...	24,011	255	121	59	8
Burma .....	b/ 3,907	6,674	4,274	1,921	282
Hong Kong .....	b/ 1,391	5,763	2,570	5,834	134
Netherlands Indies .....	2,557	2,357	1,393	162	20
Other countries .....	3,864	234	21	3,803	1,440
Total .....	47,109	43,165	22,838	26,849	3,979
<u>Imports</u>	:	:	:	:	:
British Possessions ..	16	242	18	160	-
Netherlands Indies .....	328	1,853	287	2,530	1
Other countries .....	229	50	-	-	-
Total .....	573	2,145	305	2,690	1

a/ Preliminary. b/ 2-year average.

American Consulate General, Singapore.

## BELGIAN CONGO PALM OIL PRODUCTION, EXPORTS INCREASING

Belgian Congo's palm-oil production and exports are increasing annually, according to a report from the American Consulate General, Leopoldville. The output for 1948 is estimated at 148,810 short tons and exports are expected to reach 110,230 tons, compared with 93,624 in 1947. A similar yearly increase can be anticipated for each of the next 5 years.

Latest official figures for the area devoted to palm production show that in 1947 the total in plantations was 358,950 acres of which 247,906 acres were in plantations operated by Europeans and 111,044 by natives. These figures do not include the vast areas, estimated at 618,000 acres, where wild palms grow. The extent of both the native and the European plantations is being increased in 1948, probably close to 10 percent.

On well-supervised plantations, the optimum number of producing palm trees per acre is 57, and this frequency is used on most of the European-owned plantations. The maximum life of the trees is 25 years, but they reach their best production between the twelfth and fifteenth years.

Consumption of palm oil for the current year is estimated at 38,580 tons. Large quantities from the native plantations are used in the native diet, and rations for miners and plantation workers include palm oil. Other quantities of this oil are used by soap makers, whereas a third use is in the metallurgical presses for the treatment of copper ores.

Palm-oil exports for the first 6 months of this year amounted to 45,800 short tons, of which almost 30,600 went to Belgium and over 11,000 to the United States. In addition 990 tons of hard palm oil and 8,800 tons of palm kernel oil were also shipped.

The Government General exercises control over the marketing of palm oil through the cooperative "Congopalm" and by export taxes. Effective July 1, 1948 the "Congopalm" was designated by the Direction de l'Economie of the Colony as the sole organization charged with the purchase and sale of palm oil for export. Its purpose is to direct all operations relative to the production and trade of palm oil, as well as all commercial, financial, industrial or real estate operations bearing directly or indirectly on this purpose. Although there are 25 different companies holding stock, over 50 percent is actually subscribed by the large palm firm Huilleries Du Congo Belge.

Wholesale prices of palm oil in Leopoldville on July 31, 1948, were 9,365 francs per metric ton (\$195 per short ton) for oil with less than 3 percent free fatty acid content, 9,315 francs (\$194) for oil with less than 4.25 percent, and 8,865 (\$185) for oil with less than 8 percent.

Various predictions have been made concerning the increase of palm-oil production in the future. One estimate places output at 275,575 tons by 1950 and another at 385,800 within the next 10 years. Several factors have an important bearing on future oil prospects. (1) Huileries du Congo Belge, which produces 50 percent of the oil, is now expanding and will continue systematically to increase its plantings at a rate of 10 percent a year. It expects its production to increase at the same rate. (2) The other members of the Congopal are expanding at a much faster rate and will probably increase their production at least 20 percent a year. (3) People engaged in the industry are skeptical of those high estimates because there are limitations to rapid expansion. The main one is labor; the expansion of native palm plantations has already been pushed to its logical limit. Since there is a general shortage of manpower, it is unlikely that other agricultural commodity production will be curtailed to release men for palm-oil production.

#### FRUITS, VEGETABLES AND NUTS

##### SPANISH ORANGE CROP LARGER

The first preliminary estimate of the 1948-49 sweet orange and tangerine crops in Spain is indicated to be 24.3 million boxes in the principal sweet orange and tangerine areas. Total Spanish production may reach 29.3 million boxes, 6 percent above the previous year's crop of 27.6 million, and 21 percent higher than the prewar average of 24.2 million.

Weather conditions have been satisfactory and fruit is of good size. Production in the province of Valencia is estimated at 15.6 million boxes, nearly half of the total estimated crop of Spain. Consumption of oranges and tangerines is believed to be increasing, and canning of juices and concentrates is becoming important.

The final estimate of the 1947-48 season in the principal producing areas is estimated at 23.0 million boxes. As a result of high winds during March, the equivalent of 5.3 million boxes were knocked off the trees. Of this amount 2.2 million were consumed locally and a portion of the remaining 3.1 million was used for cattle feed, essence, and juice.

Total consumption is estimated at 11.7 million boxes and exports at 8.2 million. Exports from the 1947-48 crop, in order of country importance, are as follows (in thousand boxes), the United Kingdom, 3,775, Belgium 1,018, the Netherlands 983, Sweden 961, Switzerland 518, Norway 308, Germany 305, and other countries, 326.

##### IRAN CITRUS PRODUCTION HIGHER

The 1948-49 crop of sweet oranges and tangerines in Iran is indicated to be 1,921,000 boxes, 5 percent above the previous year's crop of 1,827,000 and a little better than 3 times the prewar average of 500,000

boxes. Damage by drought in some areas was offset by an increase in the number of bearing trees, high average yield per tree due to increasing age of the trees, and to decreased pest damage. Practically the entire production of citrus fruit is consumed locally.

#### CANADIAN FRUIT PRODUCTION LOWER

According to the latest estimate from the Dominion Bureau of Statistics, the Canadian apple crop is now estimated at 14,163,000 bushels compared with 15,619,000 last year.

A slight upward adjustment in the New Brunswick apple crop was more than offset by downward revisions in Nova Scotia and Ontario. Apple exports billed through November 2 from British Columbia to the United States amounted to 712 cars. Pear production estimated at 716,000 bushels is 26 percent below the 1947 crop of 966,000 bushels. The grape harvest of 60,465,000 pounds compares with 73,803,000 pounds in 1947.

#### GRAINS, GRAIN PRODUCTS AND FEEDS (Continued from Page 386)

#### UNION OF SOUTH AFRICA REPORTS IMPROVED GRAIN SUPPLY

The Union of South Africa's record corn crop in the spring of 1948, together with good crops of winter grains, assures better grain supplies for the current season than at any time since prewar, according to a report from the agricultural attache at Pretoria. The unusually large corn crop provides a surplus estimated at about 21 million bushels. That quantity is reported available for export or carry-over during the consumption year ending 1949.

The favorable corn supply put the country in a better position to fill its import needs for wheat, of which the Union always has a deficit. During the war period wheat import needs could not be filled, and the small domestic supply necessitated severely restricted use, with the extraction rate at 96 percent. That high rate was in effect from May 1941 to November 1, 1948, when the improved grain position permitted a reduction to 80 percent in the extraction rate for white bread and 90 percent for a standard brown loaf. At the same time all restrictions on the sale of flour and bread were removed.

The lower extraction rate increases the wheat import requirements for the current season, and in turn increases the amount of subsidy the Government pays on wheat. Wheat needs are reported to have increased following a corn shortage in 1946. Along with wider acceptance of wheat in the native diet as a substitute for the usual staple, corn, improved purchasing power is expected to result in an additional increase in the natives' use of wheat.

Any significant increase in wheat consumption would, of course, be reflected in larger import requirements. The sale of 7.5 million bushels of Canadian wheat of the 1948 crop to the Union of South Africa has been authorized. This will be the first wheat transaction of any significance between those two countries for a number of years and contrasts with imports of less than 100,000 bushels from Canada in 1947-48. Delivery of the wheat is specified for April-July 1949. With more wide-spread use of wheat, corn, the principal cultivated crop, now used largely for human consumption, might be used increasingly as livestock feed.

#### SWEDEN REVISES GRAIN ESTIMATES

Seeding of all grain was completed in Sweden in mid-October and plowing was almost completed at that time. Prospects for the winter grain were reported as fairly good.

Breadgrain production in 1948 has been revised upward, and, on the basis of the August 30 official survey, wheat production is placed at about 25 million bushels and rye at about 12 million bushels. Revisions for other grains were very minor, but hay and other forage crops were increased by 5-10 percent. The hay crop, though now placed at a higher figure is still about 15 percent less than the 1936-40 average, as a result of the drought in 1947.

#### LIVESTOCK AND ANIMAL PRODUCTS

##### 1948-49 ARGENTINE WOOL CLIP DECLINES

Argentine wool production for the 1948-49 season beginning October 1, according to the latest information from Buenos Aires, is indicated at 430 million pounds. This is nearly 10 percent below the revised estimate of 475 million pounds for the 1947-48 season.

The decline in production is attributed to a decline of about 15 percent in the production of low crossbred wools, including "Criolla" and "Mestiza" wools, and to a 7 percent decline in the output of Merino and fine and medium crossbred wools. Drought conditions causing considerable losses during the past fall and winter occurred among the native flocks in the coarse-wool producing regions of the northwestern section of Argentina. Severe winter weather, including heavy snowfall, occurred after mid-July in sections of Patagonia near the Andes mountains. This reduced the output of Merino wools in these regions and resulted in tender staple. Labor difficulties and greater attractiveness of other enterprises are believed to have caused some curtailment of production in medium and fine crossbred wool in the Provinces of Entre Rios and Corrientes.

The surplus of wool available for export in 1948-49 is estimated at about 200 million pounds less than unofficial exports for the past

season. In addition to the reduction in production, a reduction in carry-over from last season because of heavy exports and anticipated higher domestic consumption contribute to the reduced supplies for export.

WORLD COTTON-- (Continued from Page 383)

In Brazil a continued decrease from 3,038,000 bales on August 1 (midseason in Southern Hemisphere) in 1946 to 1,900,000 in 1947 and to 1,200,000 in 1948 is calculated from available data. Stocks in Argentina are reported to have increased slightly from 405,000 in 1947 to 439,000 a year later. In Peru a 4-year downward trend in stocks was reported from 410,000 bales on August 1, 1945, to 285,000 in 1946, to 163,000 in 1947 and to 126,000 in 1948.

Stocks in India also declined steadily since the end of the war, amounting to about 3,000,000 bales on August 1, 1947, and 1,760,000 a year later. The 1948 stocks are sufficient for about 7 months' domestic mill requirements. Stocks of 878,000 bales in Egypt on August 1, 1948, were little more than half of the 1,354,000 reported a year ago and represented a decrease of more than 50 percent from the 1945 figure of 1,827,000 bales. In other parts of Africa stocks declined steadily since the end of the war and in nearly all locations the stocks consisted only of new-crop cotton either in ports awaiting early shipment or in process of being ginned.

Stocks in Canada, estimated at 82,000 bales in 1948, are considerably less than the 110,000 bales reported a year earlier and are sufficient for only 3 months' requirements. In Belgium, stocks remained at about 150,000 bales, representing a little more than 4 months' requirements. In France, stocks declined sharply from 920,000 bales on August 1, 1946, to 586,000 in 1947 and to 292,000 in 1948, representing less than 4 months' requirements at the current rate. Stocks in Italy, estimated at 340,000 bales on August 1, 1948, are 39 percent below the 556,000 reported a year ago and are sufficient for less than 5 months' requirements. Stocks of 1,357,000 bales in the United Kingdom on August 1, 1948, were down by 33 percent from the 2,023,000 bales reported a year ago and represented about 8 months' requirements.

Stocks in China, estimated at 1,165,000 bales, are slightly lower than the estimate of 1,230,000 bales a year ago. Commercial stocks, estimated at 865,000 bales in 1948, were equal to about 6 months' mill requirements at last year's consumption rate but mill activity may be reduced this year due to spreading military operations. Stocks in Japan, estimated at 236,000 bales on August 1, 1948, are slightly higher than the 181,000 bales reported a year ago and the 159,000 reported in 1946, but still represent little more than 4 months' requirements at last year's level of around 600,000 bales.

This is one of a series of regularly scheduled reports on world agricultural production approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the committee was composed of Joseph A. Becker, Chairman, Charles H. Barber, and Lazar Volin.

WORLD TOBACCO---(Continued from Page 370)

million pounds. Substantial decreases in 1948 output are indicated for flue-cured, fire-cured, and dark air-cured types.

For Mexico, Central America, and the Caribbean countries, information received during the past few weeks differs from that obtained some weeks ago. Some increase is now indicated in the acreage of tobacco for harvest in the early months of 1949 in Cuba, Mexico, and the Dominican Republic. Plantings in Puerto Rico are expected to about equal those of 1947. If present reported planting intentions are carried out and favorable weather prevails, the combined production in Mexico, Central America, and the Caribbean will exceed 1947-48 harvests.

For all of North America, the 1948-49 production of tobacco is forecast at 2,150 million pounds, as compared with a revised estimate of 2,421 million in 1947-48 and the average prewar production, 1935-39, of 1,710 million.

Europe. Recent estimates of 1948 production of tobacco in Europe, excluding the U.S.S.R., total below early season indications but are well above 1947 harvests. Sharp increases over 1947 are still reported for Bulgaria, Hungary, Poland, and Czechoslovakia. Increases are also indicated for Belgium, Rumania, Spain, Sweden and Switzerland. Some decrease in production is reported for France and Greece. The production in Italy, which had been expected to exceed the 1947 output, is now estimated at about equal the 1947 crop and the production in Germany is still expected to approximate the 1947 output. The total 1948 production for Europe is now estimated at 790 million pounds, as compared with the 1947 harvest of 720 million, and the prewar, 1935-39, average production of 675 million.

U.S.S.R. Authentic information on tobacco production in the U.S.S.R. in recent years still is not available. Unconfirmed reports indicate an output in 1948 somewhat above the 1947 crop but approximately 8 percent below the prewar average production of about 525 million pounds.

Asia. Turkey's 1948 tobacco harvest is forecast 181 million pounds, as compared with the 1947 production of 220 million. In the Asia minor countries, of Iran, Iraq, and Palestine, which produce Turkish type leaf, 1948 crops are still estimated to be about equal to 1947 harvests. Recent information from Syria and Lebanon, however, indicate a somewhat smaller production than in 1947. The 1948-49 tobacco crops in most of the Far Eastern Countries are still expected to exceed 1947-48 outputs. Higher crops are in prospect for China, India, Japan, Korea, Formosa, Philippine Islands, and the Netherlands East Indies. For all of Asia, 1948-49 harvests are now forecast at 3,380 million pounds, as compared with 3,150 million in 1947-48 and the prewar, 1935-39, average of 3,250 million.

South America. Reports continue to indicate lower tobacco acreages for some of the important South American producing countries, but, with normal growing conditions, combined production may approximately equal or exceed the 1947-48 harvest. Yields per acre in 1947-48 in Brazil and certain other producing countries were substantially below average. Combined 1948-49 production of tobacco in all South American countries is now forecast at 408 million pounds as compared with 400 million in 1947-48, and the prewar, 1935-39, average of 305 million pounds.

Africa. The 1948 harvest of tobacco in Algeria and other northern African producing countries is still estimated above 1947 crops. The harvests in the spring of 1949 in southern African producing countries are now forecast above harvests in the early months of 1948. Growers in British Empire areas have responded to assured market outlets in the United Kingdom for increased supplies of leaf, and reports from these areas now indicate substantially higher plantings for harvest in the first half of 1949.

The combined 1948-49 production of tobacco for all of Africa is now forecast at 220 million pounds, as compared with the 1947-48 crop of 203 million and the prewar, 1935-39, average production of only 125 million pounds.

Oceania. There have been no significant changes reported in the situation in Australia and New Zealand. The 1948-49 Australian crop is still forecast at about 4 million pounds, as compared with the short 1947-48 crop of 2.2 million. The 1948-49 crop in New Zealand is expected to approximate the 1947-48 crop of about 5 million pounds.

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This is one of a series of regularly scheduled reports on world agricultural production, approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, C. M. Purves, J. Barnard Gibbs, Constance H. Farnworth, and Mary L. E. Jones.

#### WORLD COFFEE--(Continued from Page 381)

Exportable production from Honduras during 1948-49 is placed at 45,000 bags compared with 55,000 the previous season. The 1948-49 crop in Nicaragua, forecast at 140,000 bags for export, is 100,000 bags less than 1947-48. The decrease is attributed to unusually severe and prolonged rains in the Departments of Managua and Carazo during May and June when the trees were blossoming. These two Departments produce about 70 percent of Nicaragua's coffee. Crops in the Dominican Republic and Haiti are forecast at about the same as during 1947-48, or 180,000 and 375,000 bags respectively. Exportable production in Ecuador, forecast at 215,000 bags, is larger than the 185,000 bags produced during the 1947-48 season.

Weather conditions in Ecuador have been favorable for the current crop and insect and pest damage negligible. No information is available on Venezuela's 1948-49 coffee crop. Inasmuch as no particularly unfavorable

circumstances have been reported, however, it is assumed that about 600,000 bags will be produced for export.

Africa. Exportable coffee production for Africa, forecast at 3.1 million bags, falls below the 1947-48 outturn of 3.4 million bags for export. Principal reductions are in Angola and British East Africa. Drought in Angola has resulted in an exportable production of about 521,000 bags compared with 676,000 bags last year. Trade forecasts place exportable production from British East Africa at 690,000 bags--a substantial reduction from the 803,000 bags produced in 1947-48. Unfavorable weather and insect damage are the reasons given for the smaller crop. The harvests in Madagascar for both 1947-48 and 1948-49 have been below normal as a result of political disturbances in eastern Madagascar where most of the coffee is produced.

Asia. An increase in coffee production over the previous season is indicated for Asia, mainly as a result of a larger crop in India and some progress in restoration of coffee estates in the Netherlands Indies. Although domestic consumption in Java is expected to absorb most of its 1948-49 production, substantial quantities of native-produced coffee probably will be available for export from Sumatra. Little information is available on the industry in Sumatra, but it is believed that the coffee trees have not deteriorated greatly in comparison with prewar years. Total exports of coffee from the Netherlands Indies for the 1947-48 season were unofficially estimated at 205,000 bags. In view of the present favorable prices for coffee, exports for the 1948-49 season have been forecast at about 370,000 bags.

Oceania. The small increase in Oceania's coffee production during 1948-49 is due to the larger crop of 55,000 bags forecast for Hawaii. Most of the Hawaiian coffee will be shipped to continental United States. The French possessions of New Caledonia and New Hebrides probably will have about 30,000 bags for export, although no definite information is presently available on production in these islands.

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This is one of the series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crops and Livestock Statistics. For this report the committee was composed of Joseph A. Becker, J. Barnard Gibbs, Dwight R. Bishop, and Helen B. Whitmore.

COTTON AND OTHER FIBERCOTTON - PRICE QUOTATIONS  
ON FOREIGN MARKETS

The following table shows certain cotton-price quotations on foreign markets, converted at current rates of exchange:

COTTON: Spot prices in certain foreign markets, and the U. S. gulf-port average

Market location kind, and quality	Date 1948	Unit of weight	Unit of currency	Price in foreign currency	Equivalent :U.S. cents :per pound
Alexandria		Kantar			:
Ashmouni, Good.....	11-11	99.05 lbs.	Tallari	46.25	38.59
Ashmouni, F.G.F. ....	"	"	"	43.25	36.09
Karnak, Good, .....	"	"	"	72.60	60.58
Karnak, F.G.F. ....	"	"	"	(not quoted)	
Bombay		Candy			:
Jarila, Fine.....	11-10	784 lbs.	Rupee	615.00	23.66
Broach, Fine.....	"	"	"	650.00	25.01
Kampala, East African..	"	"	"	(not available)	
Karachi		Maund			:
4F Punjab, S.G., Fine..	"	82.28 lbs.	"	73.00	26.77
289F Sind, S.G., Fine..	"	"	"	86.00	31.53
289F Punjab, S.G., Fine..	"	"	"	94.00	34.46
Buenos Aires		Metric ton			:
Type B .....	"	2204.6 lbs.	Peso	a/ 3300.00	44.57
Lima		Sp. quintal			:
Tanguis, Type 5.....	11-9	101.4 lbs.	Sol	175.00	26.61
Pima, Type 1.....	"	"	"	285.00	43.34
Recife		Arroba			:
Mata, Type 4.....	11-11	33.07 lbs.	Cruzeiro	185.00	30.44
Sertao, Type 5.....	"	"	"	195.00	32.08
Sao Paulo					:
Sao Paulo, Type 5.....	11-10	"		207.00	34.06
Torreón		Sp. quintal			:
Middling, 15/16".....	"	101.4 lbs.	Peso	180.00	25.74
Houston-Galveston-New					:
Orleans av. Mid. 15/16"	"	Pound	Cent	XXXX	30.92
					:

Quotations of foreign markets reported by cable. U.S. quotations from designated spot markets.

a/ Nominal.

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## ECONOMIC DEVELOPMENTS

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### Canada Relaxes Import Restrictions on Fresh Fruits and Vegetables

Relaxations in the emergency exchange restrictions on imports of fresh fruits and vegetables have been announced by the Canadian Minister of Finance as result of continued improvement in Canada's dollar reserve position during the past few months. Import restrictions on fruits and vegetables were imposed in November, 1947, as a part of Canada's dollar exchange conservation program.

All imports under the new procedure are subject to Canadian maximum prices established by the Canadian Wartime Prices and Trade Board.

Effective as of October 18, dollar exchange quotas for imports of citrus fruits and fruit juices and other items in the same quota group were increased from the current rate of 50 percent to 70 percent of quarterly import allocations during the base year, July 1, 1946 to June 30, 1947.

Beginning November 1, open general permits have been authorized for imports into Canada of lettuce and tomatoes from any country. Later in the winter, similar general permits will be authorized for cabbage, carrots, celery and spinach. In accordance with the statements made by the Canadian Finance Minister in Parliament in February and June, these relaxations will be timed so as not to prejudice the normal marketing of Canadian produce. Imports of each of these commodities will be authorized only when advancing prices or short supplies indicate depleted domestic stocks.

Also commencing with the last quarter of 1948, permits will be issued for the importation of grapes on a quota basis of 70 percent of the dollar value of each importer's base year (1946-47) imports. Grapes from U.S. dollar exchange areas had been prohibited entry into Canada under provisions of the Foreign Exchange Regulations effective in late 1947.



